



eRulemaking FDMS.gov 4.0 Beta Release Notes

June 2, 2012

Deliverable to:

eRULEMAKING PMO
OFFICE OF ENVIRONMENTAL INFORMATION
INFORMATION COLLECTION DIVISION
Washington, D.C.

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Release 4.0

FDMS 4.0 Beta, deployed June 2012, gives FDMS.gov a new look and feel and offers agency staff a new way to search for and view regulatory documents contained in FDMS.

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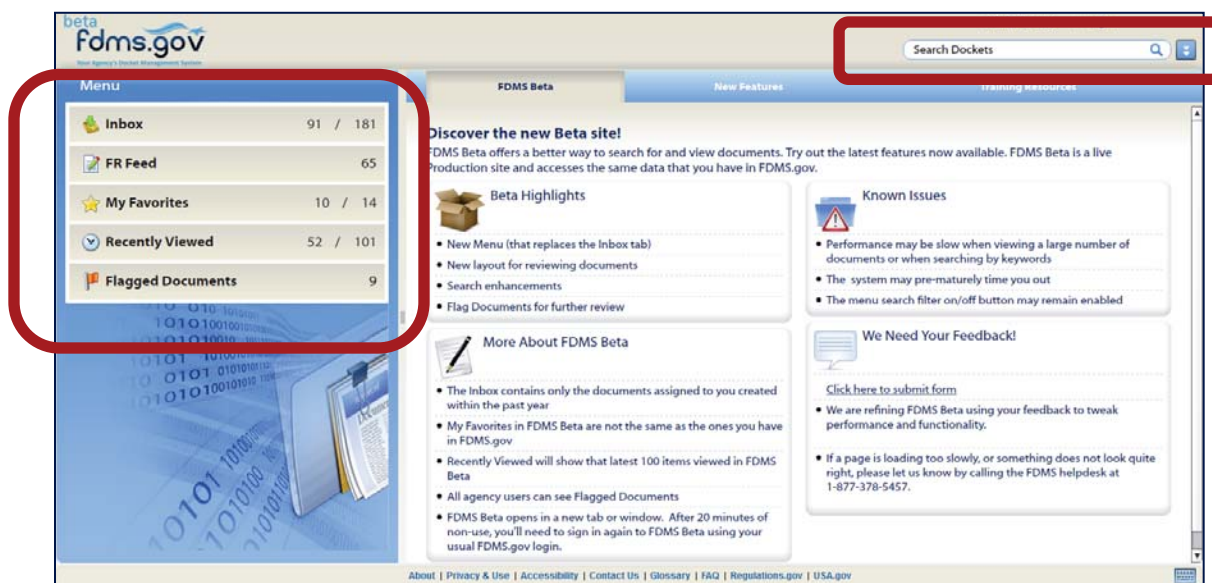
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Site Redesign

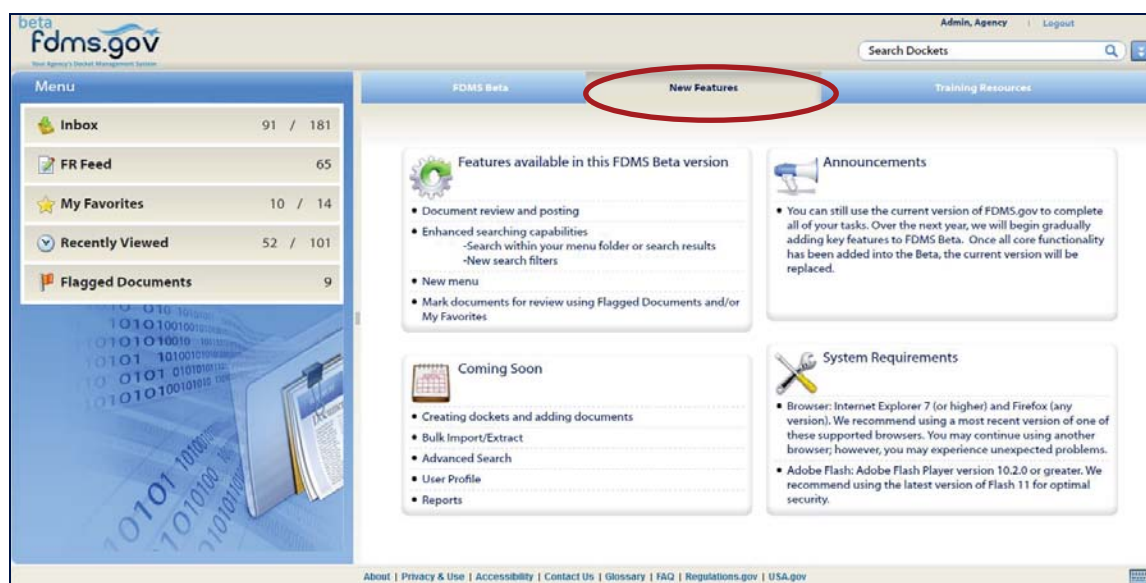
Home Page

Dockets can be accessed using multiple pathways such as the Inbox, My Favorites, Recently Viewed, as well as your Search Results. Similarly, documents can be accessed via any of the foregoing, as well as the FR Feed, Flagged Documents and the Docket Tree.



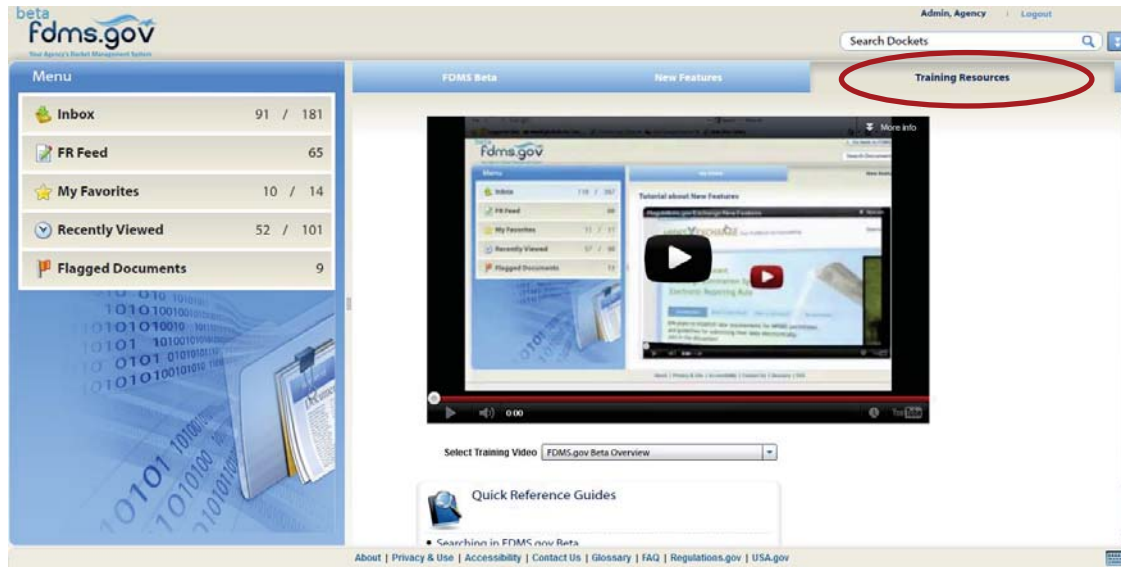
User Tabs - New Features

The New Features tab contains information on features and functionality included in FDMS 4.0 Beta and other announcements and system information.



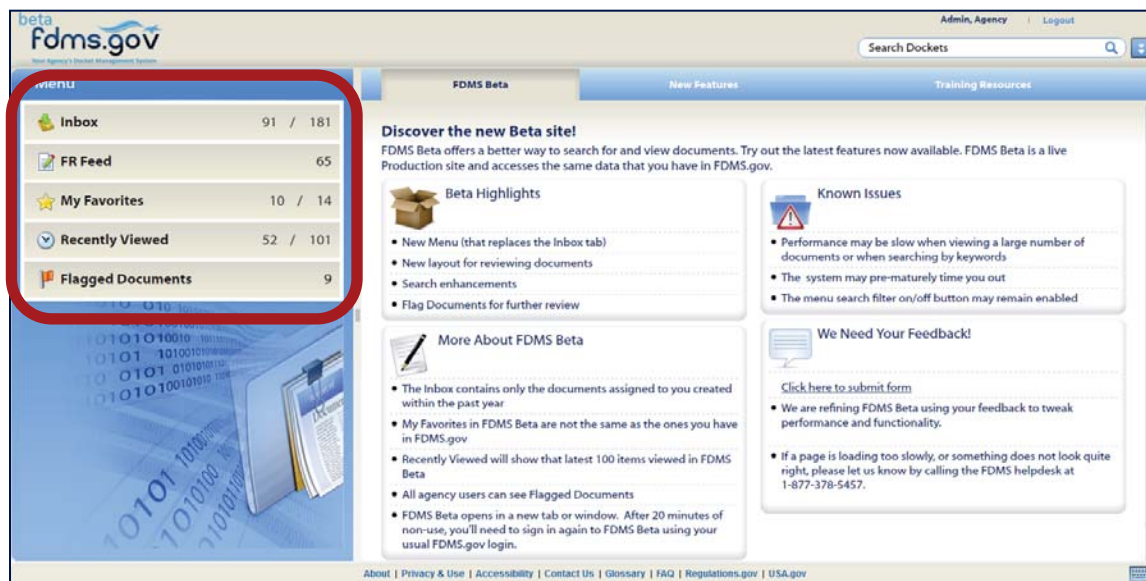
User Tabs - Training Resources

There are new training videos and Quick Reference Guides under the Training Resources tab to help users get started with the FDMS 4.0 Beta version.



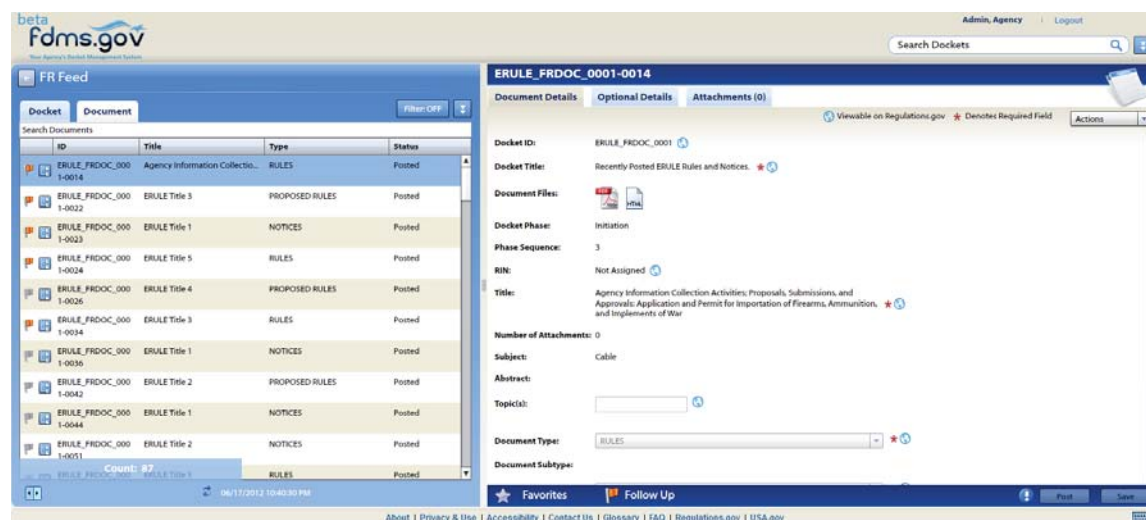
Menu

The General Menu screen includes folders for the Inbox, FR Feed (when documents are available), My Favorites, Recently Viewed, and Flagged Documents. There are counts (e.g., "91/181") beside each folder, referring either to the number of available Dockets or Documents, indicated by hover-over text.




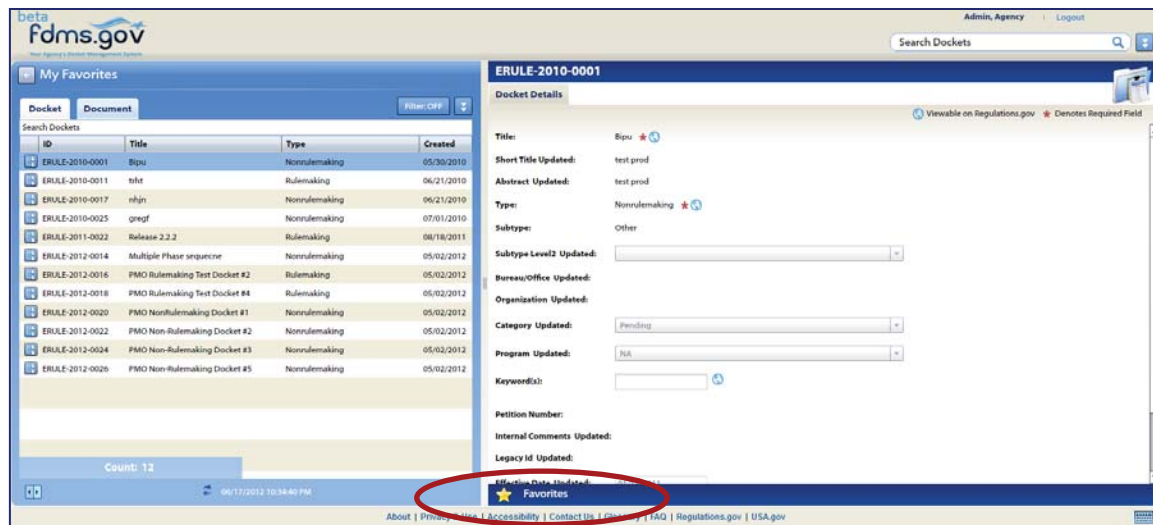
FR Feed

The FR Feed folder is available to those users who are assigned to the "FR User Group." The FR Feed screen includes Docket and Document tabs. A docket tree link is available for Docket content navigation. Docket and Document Details are displayed in the right pane when an ID is selected.



My Favorites

The “My Favorites” folder refers to the dockets and documents which the user has designated as a ‘favorite’. A user can designate any Docket or Document as a Favorite by clicking on the  icon beneath the Document Details. Note: The “My Favorites” in FDMS 4.0 Beta version are not the same as those the user has designated as favorites in the current FDMS environment.

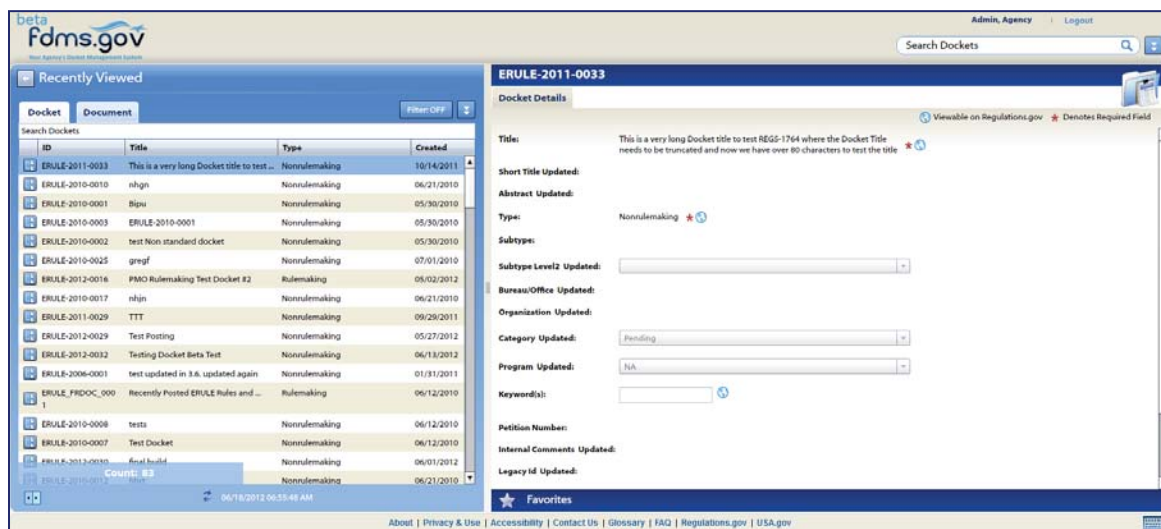


The screenshot displays the 'My Favorites' section of the FDMS.gov interface. On the left, a table lists 12 favorite dockets. The right pane shows the details for ERULE-2010-0001. A red circle highlights the 'Favorites' link in the bottom navigation bar.

ID	Title	Type	Created
ERULE-2010-0001	Bipu	Nonrulemaking	05/30/2010
ERULE-2010-0011	tblt	Rulemaking	06/21/2010
ERULE-2010-0017	nhjn	Nonrulemaking	06/21/2010
ERULE-2010-0025	greff	Nonrulemaking	07/01/2010
ERULE-2011-0022	Release 2.2.2	Rulemaking	08/18/2011
ERULE-2012-0014	Multiple Phase sequence	Nonrulemaking	05/02/2012
ERULE-2012-0016	PMO Rulemaking Test Docket #2	Rulemaking	05/02/2012
ERULE-2012-0018	PMO Rulemaking Test Docket #4	Rulemaking	05/02/2012
ERULE-2012-0020	PMO Nonrulemaking Docket #1	Nonrulemaking	05/02/2012
ERULE-2012-0022	PMO Non-Rulemaking Docket #2	Nonrulemaking	05/02/2012
ERULE-2012-0024	PMO Non-Rulemaking Docket #3	Nonrulemaking	05/02/2012
ERULE-2012-0026	PMO Non-Rulemaking Docket #5	Nonrulemaking	05/02/2012

Recently Viewed

The “Recently Viewed” folder contains the last 100 most recently viewed Dockets and Documents. The list for each will default to a sort by date viewed. Users can also use the filtering capability to sort by the other columns available.



The screenshot displays the 'Recently Viewed' section of the FDMS.gov interface. On the left, a table lists 23 recently viewed dockets. The right pane shows the details for ERULE-2011-0033.

ID	Title	Type	Created
ERULE-2011-0033	This is a very long Docket title to test...	Nonrulemaking	10/14/2011
ERULE-2010-0010	nhgn	Nonrulemaking	06/21/2010
ERULE-2010-0001	Bipu	Nonrulemaking	05/30/2010
ERULE-2010-0003	ERULE-2010-0001	Nonrulemaking	05/30/2010
ERULE-2010-0002	test Non standard docket	Nonrulemaking	05/30/2010
ERULE-2010-0025	greff	Nonrulemaking	07/01/2010
ERULE-2012-0016	PMO Rulemaking Test Docket #2	Rulemaking	05/02/2012
ERULE-2010-0017	nhjn	Nonrulemaking	06/21/2010
ERULE-2011-0029	TTT	Nonrulemaking	09/28/2011
ERULE-2012-0029	Test Posting	Nonrulemaking	05/27/2012
ERULE-2012-0032	Testing Docket Beta Test	Nonrulemaking	06/13/2012
ERULE-2008-0001	test updated in 3.6. updated again	Nonrulemaking	01/31/2011
ERULE_PRODUC_000	Recently Posted ERULE rules and ...	Rulemaking	06/12/2010
ERULE-2010-0008	tests	Nonrulemaking	06/12/2010
ERULE-2010-0007	Test Docket	Nonrulemaking	06/12/2010
ERULE-2013-0010	final build	Nonrulemaking	06/01/2012
ERULE-2010-0001		Nonrulemaking	06/21/2010

Flagged Documents

With the “Flagged Documents” feature users can mark specific documents for either future follow-up, or indicate whether additional review is needed. All agency users can add and remove Flags from Documents. Unlike the documents that you mark as “My Favorites,” your “Flagged Documents” can be viewed by all agency users.

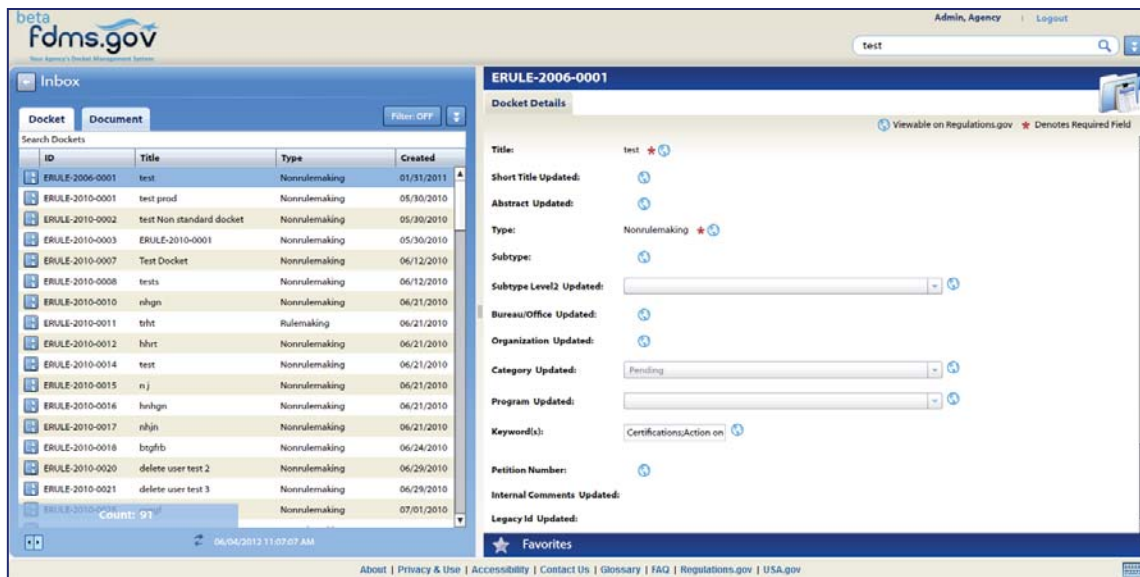
The Docket and Document Filters can be set to show Flagged Documents.

The screenshot displays the FDMS.gov web application. On the left, the 'Flagged Documents' section is active, showing a table of documents with columns for ID, Title, Type, and Status. The table lists several documents, including 'ERULE-2006-0001-DRAFT-0011' which is marked as 'Pending_Post'. On the right, the details for 'ERULE-2006-0001-DRAFT-0011' are shown. The 'Document Details' tab is selected, displaying fields for Docket ID, Docket Title, Document Files, Docket Phase, Phase Sequence, Title, Subject, Abstract, Topic(s), Document Type, and Document Subtype. The 'Document Subtype' field is set to '335 - Agency Information Collection'. At the bottom of the document details, there are two buttons: 'Favorites' and 'Follow Up'. The 'Follow Up' button is circled in red, indicating the action to be taken to flag the document.


Functionality Included in FDMS 4.0 Beta

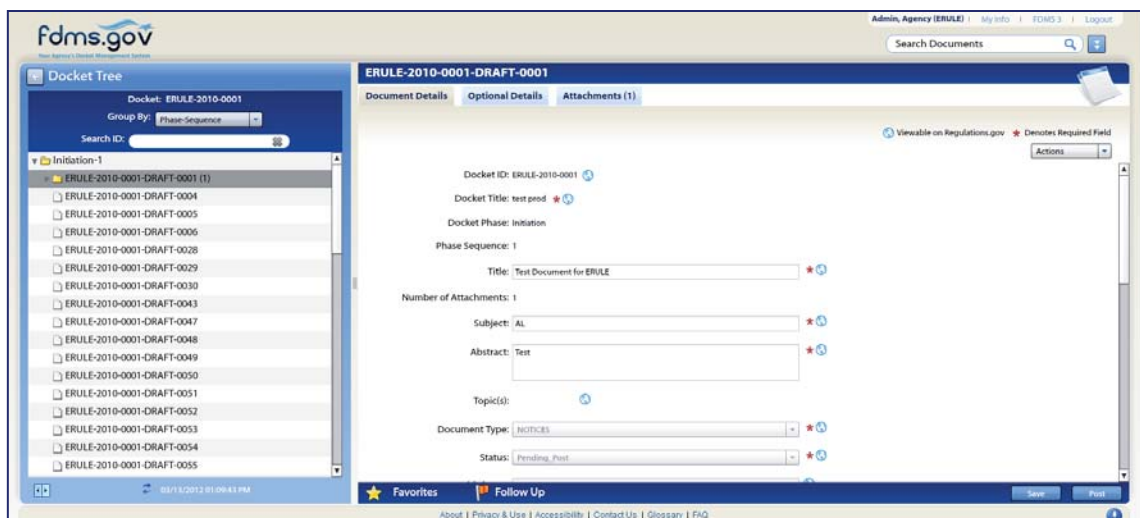
Docket Management *Docket Details*

Docket Details are available for users to view in a read-only format.



Docket Tree

Users can access the Docket Tree from multiple areas by click on the  icon in the Docket list. Within the Docket Tree users can group their dockets by: Phase Sequence, Status, Date Received, and Document Type. Users can also search the list of Documents using the *Search ID* field.

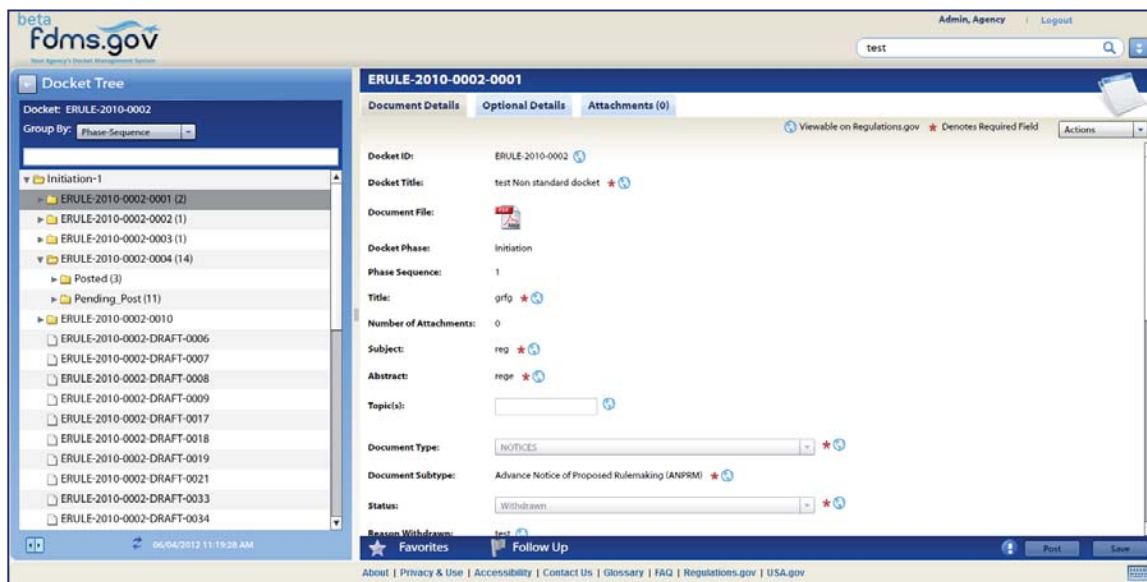


Document Management

Document Details

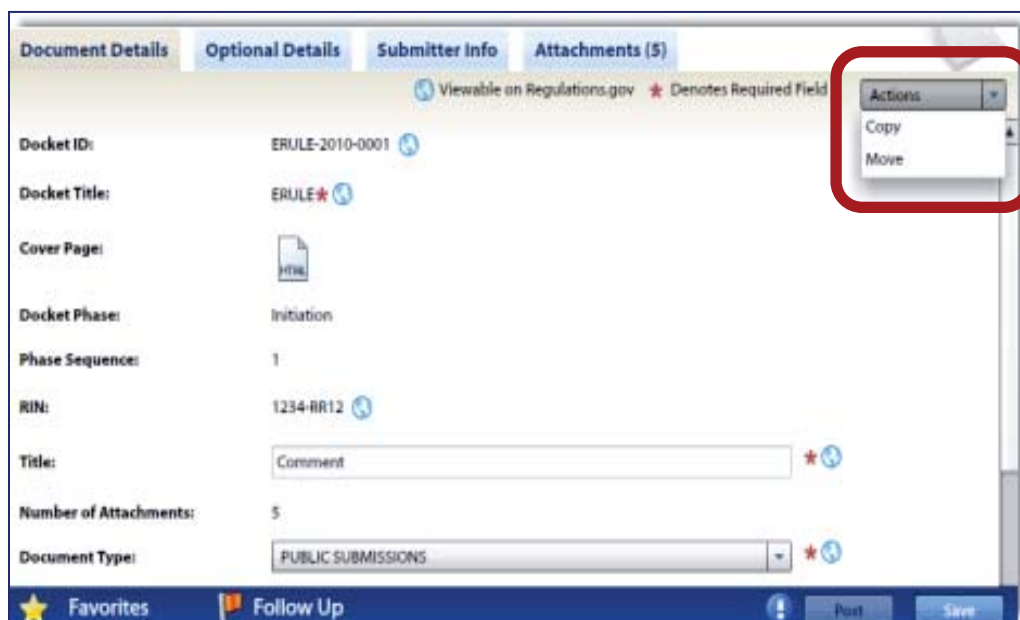
The following functionality is available in FDMS 4.0 Beta:

- Documents can be labeled as Favorites or Flagged for follow-up.
- Documents can be posted.
- Save button is displayed instead of "Submit" to save changes.
- The Optional Details tab contains non-required metadata fields.
- The Submitter Information tab can be enabled or disabled.



Copy/Move

The Copy and Move options are accessible from the Actions' drop down menu within Document Details.



Posting

By simply using the Document Details tab a user can post their documents. If the document is not ready to be posted, the user can view the note containing the reason to the left of the Post button.

The screenshot shows the FDMS.gov interface. On the left is an 'Inbox' with a table of documents. The main area is titled 'ERULE-2010-0001-DRAFT-0048' and has tabs for 'Document Details', 'Optional Details', and 'Attachments (0)'. The 'Document Details' tab is active, showing a form with fields like 'Legacy ID', 'Related RIN(s)', 'Additional Field 1', 'Additional Field 2', 'Special Instructions', 'Tracking Number', 'Exhibit Type', 'Exhibit Location', 'Page Count', 'Paper Length', and 'Paper Width'. At the bottom right, there are 'Post' and 'Save' buttons, with the 'Post' button highlighted by a red rectangle.

Attachments

All Document Attachments are displayed in a split screen view. The highlighted attachment's details are displayed at the bottom of the screen.

The screenshot shows the FDMS.gov interface. On the left is an 'Inbox' with a table of documents. The main area is titled 'ERULE-2011-0013-DRAFT-0003' and has tabs for 'Document Details', 'Optional Details', 'Submitter Info', and 'Attachments (3)'. The 'Attachments (3)' tab is active, showing a table of attachments. The details for the selected attachment are displayed at the bottom, including fields for 'Title', 'Views', 'Abstract', 'Authors', 'Page Count', 'Agency Note', 'Publication Reference', and 'Posting Restriction'.

Search

Docket/Document Global Search

The metadata fields that are searched via the searched are:

- Document ID, Title (title)
- Abstract (applies to ALL Document Types)
- Subject (subject) -- applies to ALL Document Types EXCEPT Comments, Legacy ID, Comment Tracking Number, Topic(s) (i.e., keywords applied to Document Types FRs AND Other)
- First Name (first_name) -- applies to Document Types WITH Submitter Info
- Last Name (last_name) -- applies to Document Types WITH Submitter Info
- Organization Name (organization) -- applies to Document Types WITH Submitter Info

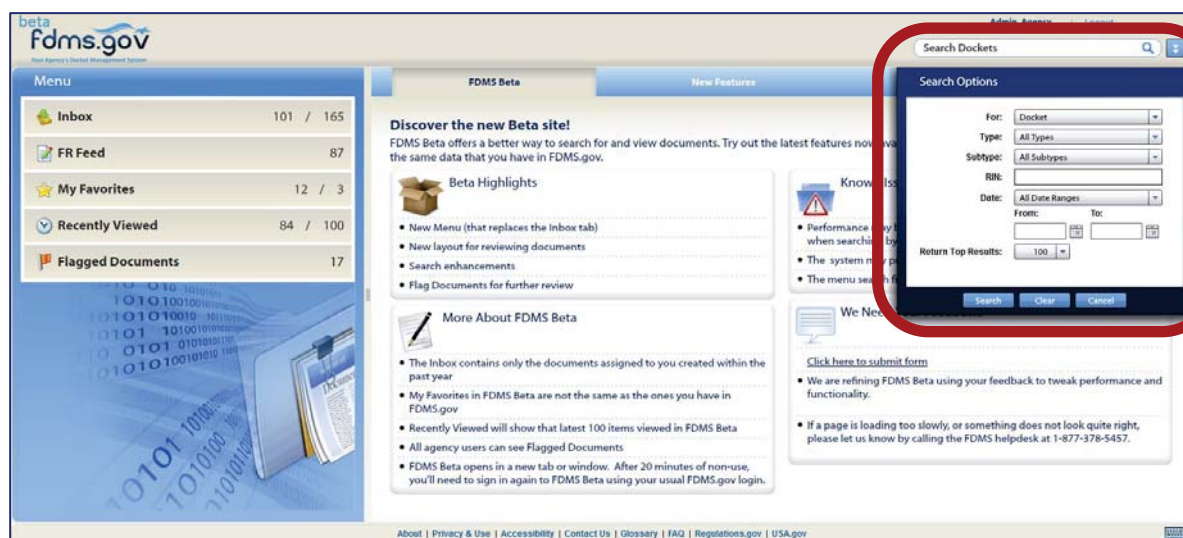
Whenever an ID (i.e., contains a dash) is entered in the global search field the following fields are searched:

- Document ID -- applies to ALL Document Types
- Legacy ID -- applies to ALL Document Types
- Federal Register Number -- applies to FR Document Types

If the user enters a date as a keyword in the global search field then it must follow the format mm/dd/yyyy. For a date the following metadata fields are searched:

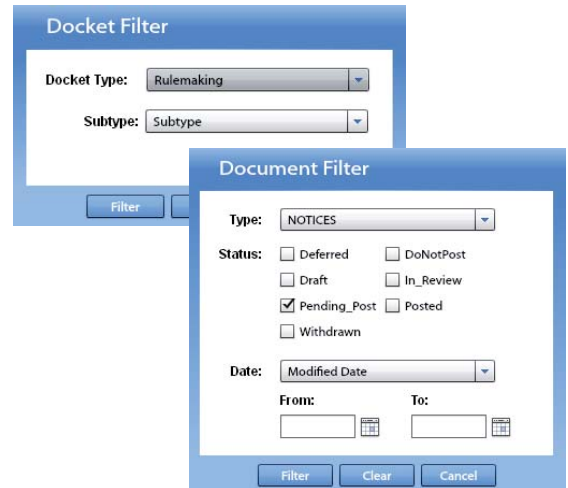
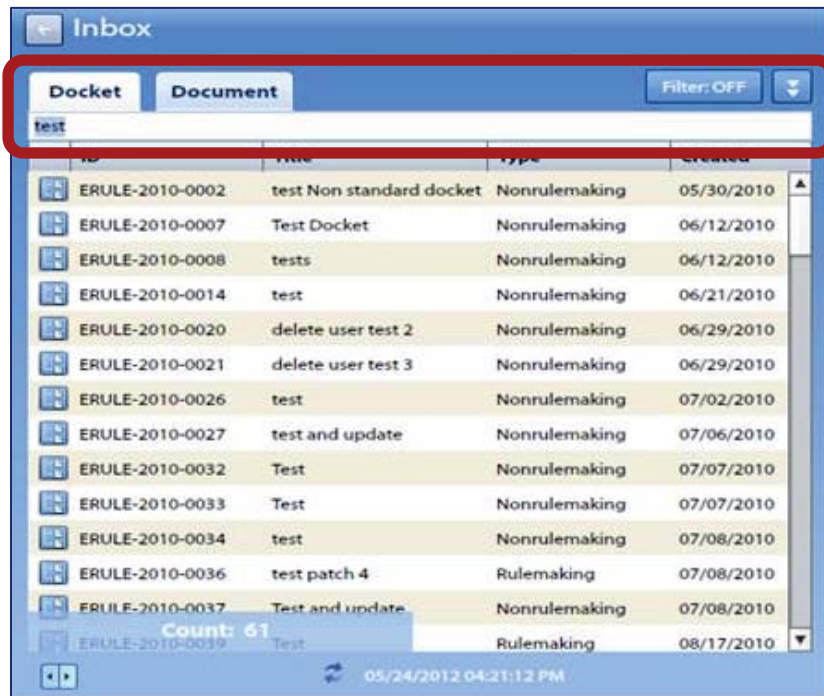
- Author Date -- applies to Document Types Other AND S&RM
- Received Date -- applies to ALL Document Types

Note: Additional search options are available using the drop down to the right of the search box.



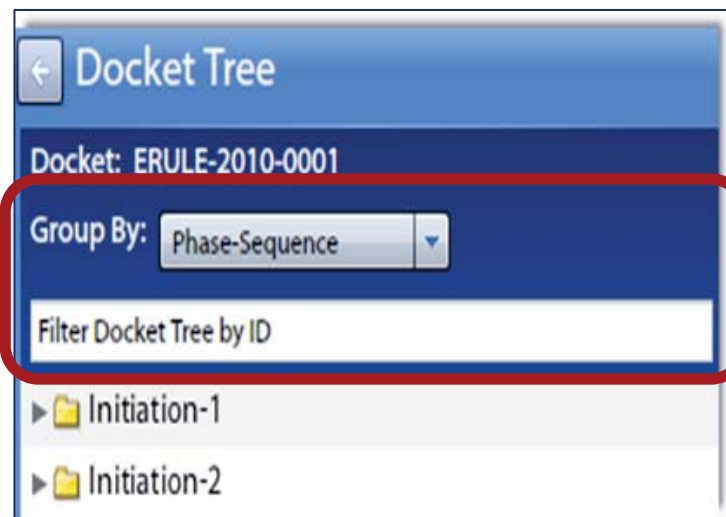
Docket and Document List Search

A Search Bar is available in the Docket and Document lists to narrow results. Additional search filter options are available using the drop down in the upper right part of the pane.



Docket Tree Search

In the Docket Tree, the Group By menu is available for sorting results. Results can be narrowed using the "Filter Docket Tree by ID" search bar.



Folder Search

The Documents within a folder are displayed when the folder (Phase folder, Document Type folder, or Status folder) is selected in the Docket Tree. Users can enter an full or partial ID, Title, Type, or Status to be searched in the list below.

The screenshot shows the FDMS.gov interface. On the left, the 'Docket Tree' is expanded to show a list of folders under 'Initiation-1'. The main area displays a table of documents. A red box highlights the search bar in the top right of the main area, which is labeled 'Filter Phase Details' and 'Search on ID, Title, Type and Status'.

ID	Title	Type	Status	Views	Attachments	Comments
ERULE-2010-0001-DRAFT-0028	Test and update	NOTICES	Pending_Post	1	0	
ERULE-2010-0001-DRAFT-0029	Test and update	NOTICES	Pending_Post	1	0	
ERULE-2010-0001-DRAFT-0030	test for notification	NOTICES	DobutPost	0	0	
ERULE-2010-0001-DRAFT-0043	Rolon Test copy move	NOTICES	Pending_Post	2	0	
ERULE-2010-0001-DRAFT-0048	Copy (11) of DRAFT 3 1 VRV User Test Cases Rnd 1 Final.doc	OTHER	Pending_Post	0	0	
ERULE-2010-0001-DRAFT-0049	Copy (12) of DRAFT 3 1 VRV User Test Cases Rnd 1 Final.doc	OTHER	Pending_Post	0	0	
ERULE-2010-0001-DRAFT-0051	Copy (14) of DRAFT 3 1 VRV User Test Cases Rnd 1 Final.doc	OTHER	Pending_Post	0	0	
ERULE-2010-0001-DRAFT-0052	Copy (15) of DRAFT 3 1 VRV User Test Cases Rnd 1 Final.doc	OTHER	Pending_Post	0	0	
ERULE-2010-0001-DRAFT-0053	Copy (16) of DRAFT 3 1 VRV User Test Cases Rnd 1 Final.doc	NOTICES	Pending_Post	0	0	
ERULE-2010-0001-DRAFT-0055	Copy (18) of DRAFT 3 1 VRV User Test Cases Rnd 1 Final.doc	PROPOSED RULES	Pending_Post	0	0	
ERULE-2010-0001-DRAFT-0056	Copy (19) of DRAFT 3 1 VRV User Test Cases Rnd 1 Final.doc	NOTICES	Pending_Post	0	0	
ERULE-2010-0001-DRAFT-0057	Copy (2) of DRAFT 3 1 VRV User Test Cases Rnd 1 Final.doc	OTHER	Pending_Post	0	0	
ERULE-2010-0001-DRAFT-0058	Copy (20) of DRAFT 3 1 VRV User Test Cases Rnd 1 Final.doc	OTHER	Pending_Post	0	0	

Menu Folder Search

Users can enter an full or partial ID, Title, Type, or Status to be searched in the list below.

The screenshot shows the FDMS.gov interface. On the left, the 'Inbox' is expanded to show a list of documents. The main area displays a table of documents. A red box highlights the search bar in the top right of the main area, which is labeled 'Filter: OFF' and 'Search Dockets'.

ID	Title	Type	Status	Views	Attachments	Comments
ERULE-2010-0001	Bipu	Nonrulemaking	05/30/2010			
ERULE-2010-0002	test Non standard docket	Nonrulemaking	05/30/2010			
ERULE-2010-0003	ERULE-2010-0001	Nonrulemaking	05/30/2010			
ERULE-2010-0007	Test Docket	Nonrulemaking	06/12/2010			
ERULE-2010-0008	tests	Nonrulemaking	06/12/2010			
ERULE-2010-0010	nhgn	Nonrulemaking	06/21/2010			
ERULE-2010-0011	thrt	Rulemaking	06/21/2010			
ERULE-2010-0012	hhrt	Nonrulemaking	06/21/2010			
ERULE-2010-0014	test	Nonrulemaking	06/21/2010			
ERULE-2010-0015	nj	Nonrulemaking	06/21/2010			
ERULE-2010-0016	hnhgn	Nonrulemaking	06/21/2010			
ERULE-2010-0017	nhgn	Nonrulemaking	06/21/2010			
ERULE-2010-0018	btghb	Nonrulemaking	06/24/2010			
ERULE-2010-0020	delete user test 2	Nonrulemaking	06/29/2010			
ERULE-2010-0021	delete user test 3	Nonrulemaking	06/29/2010			
ERULE-2010-0025	gregf	Nonrulemaking	07/01/2010			
ERULE-2010-0026		Nonrulemaking	07/02/2010			

Menu Folder Filter

There is a Docket and Document filter available within all Menu Folders.

- The system will save a user's filter between sessions.
- Users can toggle the filter on and off in order to view all results or the filtered subset.

The screenshot displays the FDMS.gov web application interface. On the left, the 'Inbox' section shows a list of documents under the 'Document' tab. A 'Document Filter' dialog box is overlaid on this list, featuring a 'Filter: OFF' toggle. The dialog includes a 'Type' dropdown set to 'NOTICES', a 'Status' section with checkboxes for 'Deferred', 'DoNotPost', 'Draft', 'In Review', 'Pending_Post' (checked), 'Posted', and 'Withdrawn', and a 'Date' section with a 'Modified Date' dropdown and 'From'/'To' date pickers. 'Filter', 'Clear', and 'Cancel' buttons are at the bottom of the dialog. The right side of the interface shows the 'ERULE-2010-0001-DRAFT-0048' document details, including fields for 'Docket ID', 'Docket Title', 'Document Files', 'Docket Phase', 'Phase Sequence', 'Title', 'Number of Attachments', 'Subject', 'Abstract', 'Author(s)', and 'Topic(s)'. The footer contains navigation links like 'About', 'Privacy & Use', 'Accessibility', 'Contact Us', 'Glossary', 'FAQ', 'Regulations.gov', and 'USA.gov'.